



Completing a Manual Event Enrollment Overview

This Job Aid provides a walkthrough of the steps a Locality BA must complete to submit a manual benefit event on behalf of the employee. These steps include using the Review BAS Activity page to create the event and the On-Demand Event Maintenance Page to process the event. For qualifying life events not completed through ESS, the employee must submit a life event form along with the supporting documentation to the BA with all the information necessary to complete the benefit enrollment process.

Table of Contents

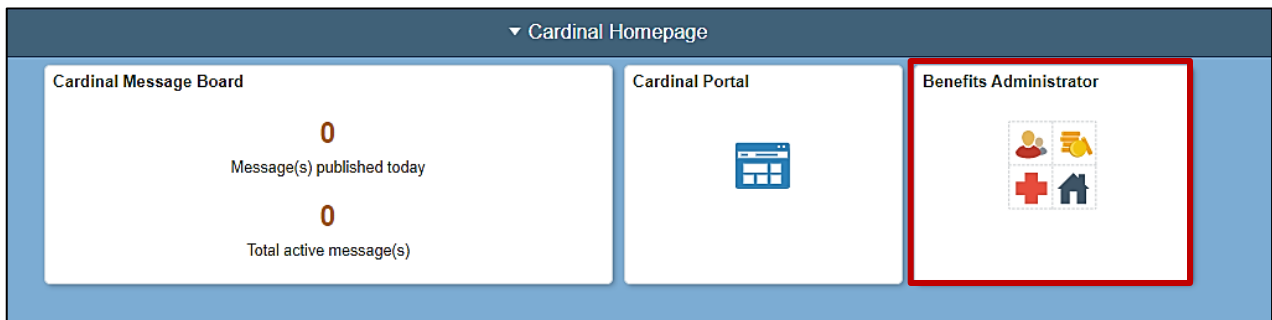
Manual Event for Benefit Enrollment2

Manual Event for Benefit Enrollment

This job aid uses the following example scenario: An employee has submitted a life event form with supporting documentation for a birth event to their Locality BA. The Locality BA must add the BIR manual event, add the child dependent, complete the updated benefit enrollment, and finalize the benefit event.

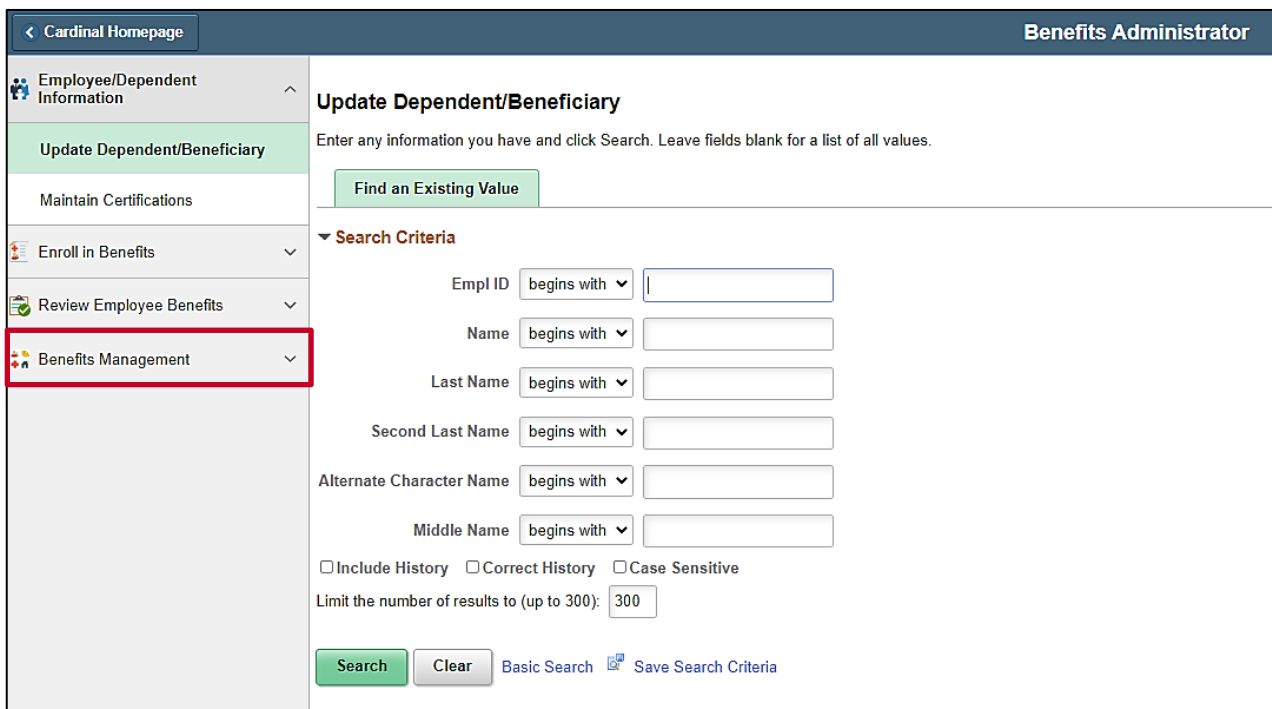
1. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.



2. Click on the **Benefit Administrator** tile on the Cardinal Homepage.

The **Benefits Administration** page displays with the **Employee Dependent/Beneficiary** tab displayed by default.



3. Click the **Benefits Management** list item on the left-hand side of the screen.



Benefits Job Aid

BN361 Completing a Manual Event

The **Benefit Management** tab displays.

< Cardinal Homepage Benefits Administrator

Employee/Dependent Information

Update Dependent/Beneficiary

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Empl ID begins with

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

Limit the number of results to (up to 300):

Search Clear Basic Search Save Search Criteria

4. Click the **Review BAS Activity** list item on the left-hand side of the screen.

The **Review BAS Activity** page displays.

Employee	Event	Effective Date	End Date	Event Type	Event Code	Event Description	Event Status
Mini Mouse	Job Data Change	0	0	10/01/2021	0	LOA	
Mickey Mouse	Job Data Change	0	0	10/25/2021	0	JOB	
Mickey Mouse	Job Data Change	0	0	10/22/2021	0	HIR	
Mickey Mouse	Address Change	0	0	10/25/2021	0	ADR	
Goofy Toon	Job Data Change	0	0	12/30/2020	0	JOB	
Mickey Duck	Job Data Change	0	0	10/27/2021	0	HIR	
PEPPA PIG	Job Data Change	0	0	12/15/2020	0	XFO	TER
PEPPA PIG	Job Data Change	0	0	12/01/2020	0	JOB	
PEPPA PIG	Job Data Change	0	0	10/01/2020	0	HIR	
PEPPA PIG	Job Data Change	0	1	11/04/2021	0	XFR	

+

Save Notify Refresh

1-21 of 21 View All

Note: This page contains two scroll bars. Make sure to scroll all the way down on both the page scroll bar and the table scroll bar before continuing.

5. Click the **+** button to add a row.



Benefits Job Aid

BN361 Completing a Manual Event

The **BAS Activity** page refreshes and displays a new row to input data.

Employee	Event	Effective Date	BAS Action
Mini Mouse	Job Data Change	10/01/2021	LOA
Mickey Mouse	Job Data Change	10/25/2021	JOB
Mickey Mouse	Job Data Change	10/22/2021	HIR
Mickey Mouse	Address Change	10/25/2021	ADR
Goofy Toon	Job Data Change	12/30/2020	JOB
Mickey Duck	Job Data Change	10/27/2021	HIR
PEPPA PIG	Job Data Change	12/15/2020	XFO
PEPPA PIG	Job Data Change	12/01/2020	JOB
PEPPA PIG	Job Data Change	10/01/2020	HIR
PEPPA PIG	Job Data Change	11/04/2021	XFR
	Manual Event	11/05/2021	

- Enter the **Empl ID**.
- The Effective Date defaults to today's date. Enter the **Effective Date** for the Manual Event accordingly.
- Enter the **BAS Action** for the Birth Life Event (BIR). The magnifying glass can be used to search for the BAS Action if unknown.

Note: If the manual life event triggers COBRA coverage (e.g., a DIV event), the BA has to also fill out the COBRA code associated to that manual event on the **BAS Activity** page.

- Click **Save**.
- Click on the **On-Demand Event Maintenance** list item on the left-hand side of the screen.

The **On-Demand Event Maintenance** page displays.

On-Demand Event Maintenance

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Empl ID begins with

Empl Record =

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

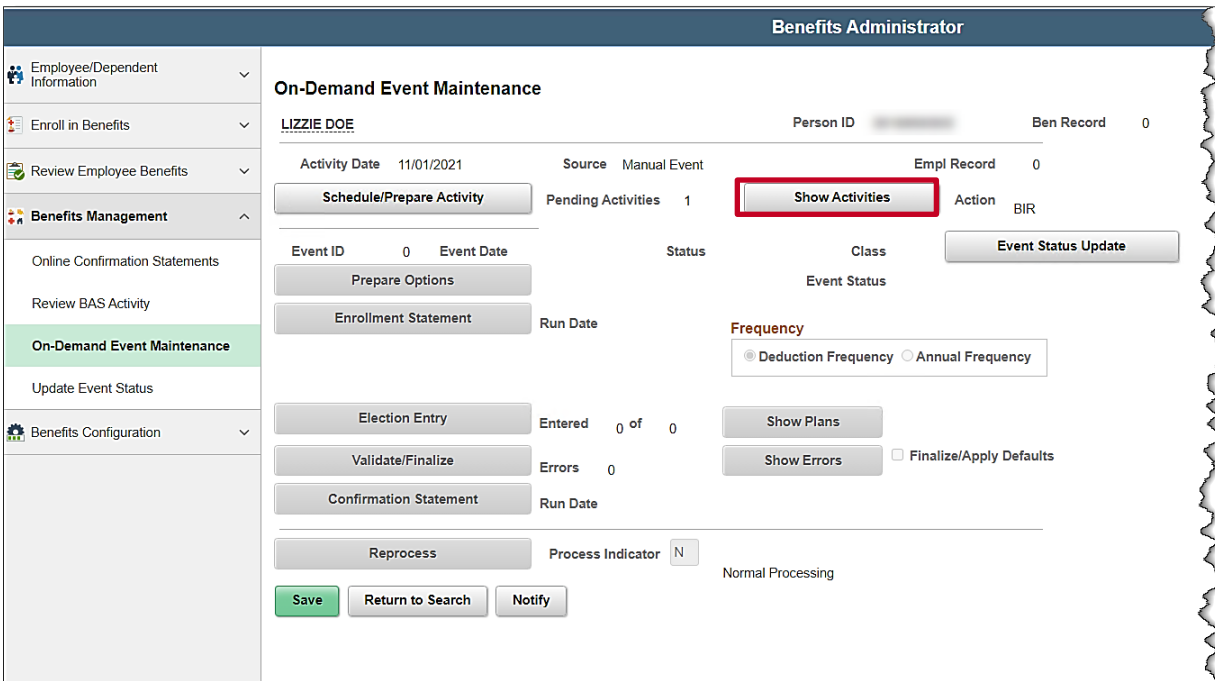
☐ Case Sensitive

Limit the number of results to (up to 300):

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

11. Enter the **Empl ID** in the corresponding search box.
12. Click **Search**.

The **On-Demand Event Maintenance** page displays for the Employee.



Benefits Administrator

On-Demand Event Maintenance

LIZZIE DOE Person ID [REDACTED] Ben Record 0

Activity Date 11/01/2021 Source Manual Event Empl Record 0

Schedule/Prepare Activity Pending Activities 1 **Show Activities** Action BIR

Event ID 0 Event Date Status Class Event Status

Prepare Options

Enrollment Statement Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 0 of 0 **Show Plans**

Validate/Finalize Errors 0 **Show Errors** ☐ Finalize/Apply Defaults

Confirmation Statement Run Date

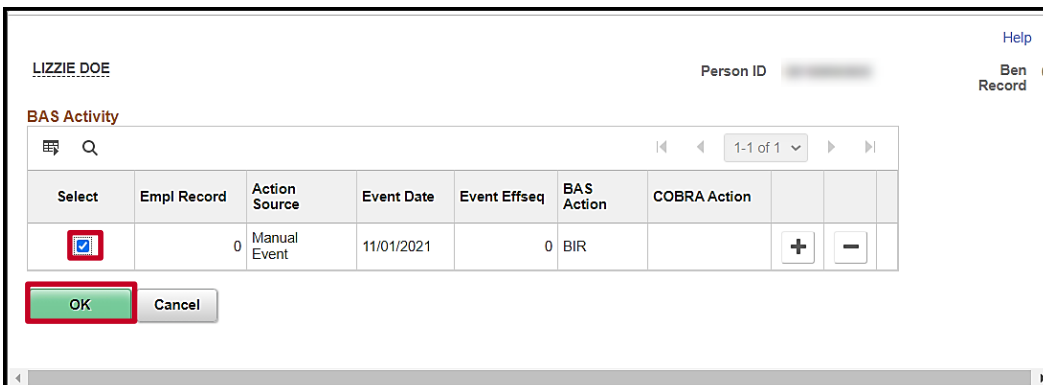
Reprocess Process Indicator N Normal Processing

Save **Return to Search** **Notify**

Note: If there is a delay between creating the event on the Review BAS Activity page and navigating to the On-Demand Event Maintenance page, the Benefits Administration process may have run, which would schedule the activity for you. In this case, skip to Step 18.

13. Click on the **Show Activities**.

The **Bas Activity** table pop up displays.



LIZZIE DOE Person ID [REDACTED] Ben Record 0

BAS Activity

1-1 of 1

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input checked="" type="checkbox"/>	0	Manual Event	11/01/2021	0	BIR	

OK **Cancel**

14. Confirm that the manual event just added (BIR) has a check in the checkbox.
15. Click **OK**.



Benefits Job Aid

BN361 Completing a Manual Event

The **On-Demand Event Maintenance** page returns.

Benefits Administrator

On-Demand Event Maintenance

LIZZIE DOE Person ID [REDACTED] Ben Record 0

Activity Date 11/01/2021 Source Manual Event Empl Record 0

Schedule/Prepare Activity Pending Activities 1 Show Activities Action BIR

Event ID 0 Event Date Status Class Event Status

Prepare Options

Enrollment Statement Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

16. Click on the **Schedule/Prepare Activity** button to initiate the automated programming process that schedules and prepares pending activity and opens election entry for this event.

17. Click **OK** in the pop-up window.

The **On-Demand Event Maintenance** page returns.

Benefits Administrator

On-Demand Event Maintenance

LIZZIE DOE Person ID [REDACTED] Ben Record 0

Activity Date 11/01/2021 Source Manual Event Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 11/01/2021 Status Prepared Class BIR Event Status Open for Processing

Prepare Options

Enrollment Statement Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 0 of 1 Show Plans

Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

18. Click on the **Election Entry** button to open the benefit admin election pages.



Benefits Job Aid

BN361 Completing a Manual Event

The **Option Election** page will display.

BenAdmin Data Entry

Event / Participant Selection | **Option Election** | Dependents / Beneficiaries

Sched ID EM00 Empl ID LIZZIE DOE Ben Record 0 Event ID 2
Event Data 11/01/2021 Birth or Adoption Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 1

Plan Type 10 : Medical

Option Code 22 Key Adv 500 Preventive Dent (176F06) (Self + Spouse)

Health Provider ID ☐ Previously Seen [Special Requirements](#)

Dependents/Beneficiaries

Enroll All

Dependents/Beneficiaries

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
01	Billy Doe	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	-

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

- Click on the magnifying glass next to **Option Code** under the **Plan Type 10: Medical** section.



Benefits Job Aid

BN361 Completing a Manual Event

The **Option Code** options display for the Plan Type 10: Medical.

BenAdmin Data Entry

Event / Participant Selection | **Option Election** | Dependents / Beneficiaries

Sched ID EM00 Empl ID LIZZIE DOE Ben Record 0 Event ID 2
Event Data 11/01/2021 Birth or Adoption Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ? 1 of 1

Plan Type 10 : Medical

Option Code 22 Key Adv 500 Preventiv

Health Provider ID

Special Requirements

Dependents/Beneficiaries

Enroll All

Dependents/Beneficiaries

ID	Name	Relationship to Employee	Age Limit Flag
01	Billy Doe	Spouse	

OK Cancel Apply Refresh

Look Up Option Code

Cancel

Search Results

View 100 1-2 of 2

Option Code	Option Type	Benefit Plan	Coverage Code
22	Option	176F06	2
24	Option	176F06	4

20. Select the same type of plan the employee currently has but with a **Coverage Code 4** (Family coverage).



Benefits Job Aid

BN361 Completing a Manual Event

The **Election Entry** page returns.

BenAdmin Data Entry

Event / Participant Selection | **Option Election** | **Dependents / Beneficiaries**

Sched ID EM00 Empl ID [REDACTED] LIZZIE DOE Ben Record 0 Event ID 2
Event Data 11/01/2021 Birth or Adoption Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 1

Plan Type 10 : Medical

Option Code 24 Key Adv 500 Preventive Dent (176F06) (Family)

Health Provider ID ☐ Previously Seen

Special Requirements

Dependents/Beneficiaries

Enroll All

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Billy Doe	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>

OK Cancel Apply Refresh

21. Click on the **Dependents/Beneficiaries** tab.

The **Dependent/Beneficiary** tab displays.

BenAdmin Data Entry

Event / Participant Selection | Option Election | **Dependents / Beneficiaries**

Schedule ID EM00 Employee ID [REDACTED] LIZZIE DOE
Event ID 2 Event Data 11/01/2021 Birth or Adoption
Benefit Record 0 Excess Credit Rollover To Forfeit Excess Credits

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Doe, Billy	Spouse	Approved Dependent	02/05/1993

Change/Add Dependent Data

Elections Requiring Supplemental Information

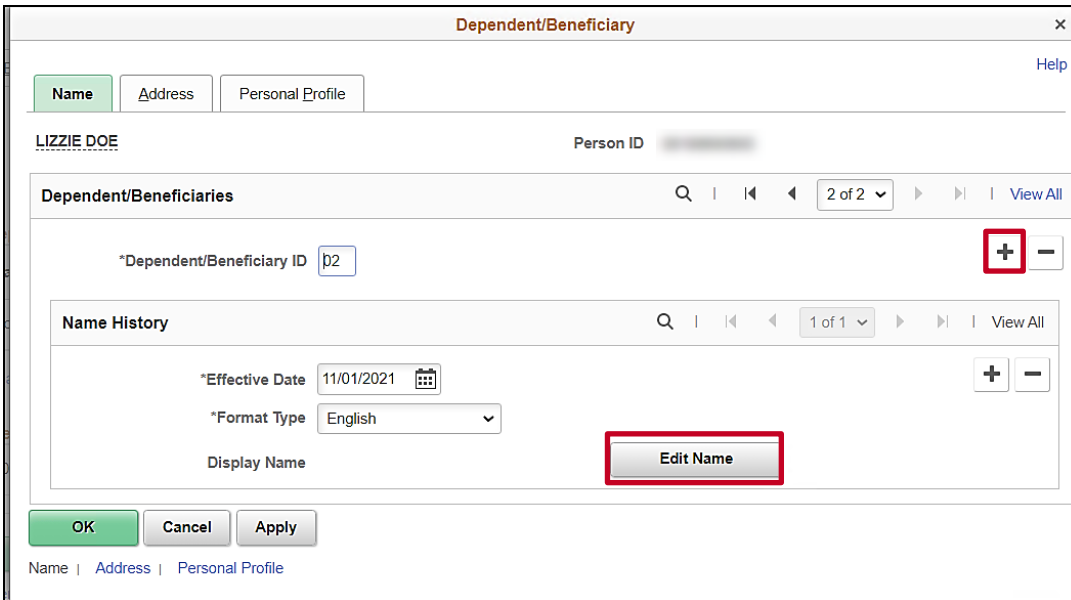
Option Code	Plan Type	Action
10	Medical	Enroll Dependents

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

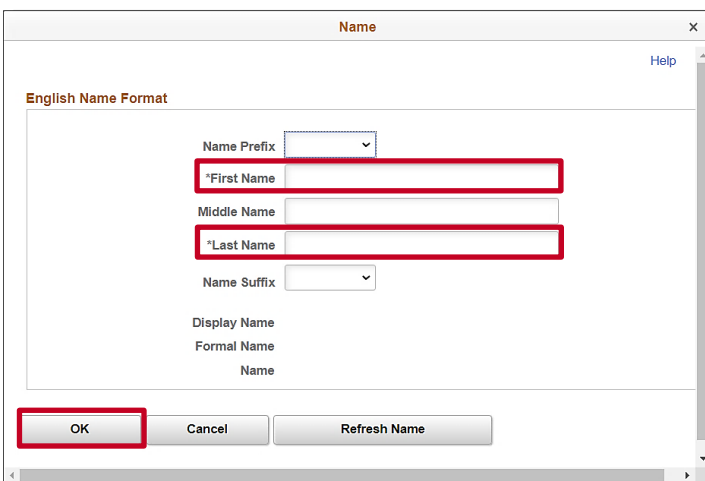
22. Click on the **Change/Add Dependent Data** hyperlink to add the dependent to the employee record.

The **Dependent Data** page pop up displays.



23. Click on **Edit Name**.

The **Name** page pop-up displays.



24. Enter the **First Name** and **Last Name**. The other fields are optional.

25. Click **OK**.

Note: The dependent's name will now show next to the **Display Name** field.



Benefits Job Aid

BN361 Completing a Manual Event

The **Dependent Information** page returns.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Name' tab selected. The 'Address' tab is highlighted with a red box. The form displays the name 'LIZZIE DOE' and a 'Person ID' field. Below this is a 'Dependent/Beneficiaries' section with a search bar and a '2 of 2' dropdown. A 'Name History' section shows a table with one entry: 'Lily Doe' with an effective date of '11/01/2021' and a format type of 'English'. The 'Display Name' is 'Lily Doe'. There is an 'Edit Name' button. At the bottom are 'OK', 'Cancel', and 'Apply' buttons. Navigation links for 'Name', 'Address', and 'Personal Profile' are at the bottom.

The **Address** page displays.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Address' tab selected. The 'Personal Profile' tab is highlighted with a red box. The form displays the name 'LIZZIE DOE' and a 'Person ID' field. Below this is an 'Address History' section with a search bar and a '1 of 1' dropdown. A table shows one entry: 'Lily Doe' with an effective date of '11/01/2021'. The 'Same Address as Employee' checkbox is checked and highlighted with a red box. The 'Address Type' is 'USA'. Below this is an 'Address' section with a search bar and a 'United States' dropdown. There is an 'Edit Address' button. At the bottom are 'OK', 'Cancel', and 'Apply' buttons. Navigation links for 'Name', 'Address', and 'Personal Profile' are at the bottom.

26. Check the box next to **Same Address as Employee**.



Benefits Job Aid

BN361 Completing a Manual Event

Note: If the Locality BA receives a **Phone Number** and/or **Email Address** for the dependent, this is the page used to enter that information. For this example, there is no information for Phone or Email. These fields are not required.

27. Click on **Personal Profile** tab.

The **Personal Profile** page displays.

Dependent/Beneficiary

Name Address **Personal Profile** Help

LIZZIE DOE Person ID [REDACTED]

Personal Profile 2 of 2 View All

Dependent/Beneficiary ID 02 Lily Doe

Date of Birth [REDACTED] Birth Location Birth Country Birth State Riders/Orders exist

Date of Death Medicare Entitled Date

Riders/Orders

Personal History 1 of 1 View All

*Effective Date 11/01/2021

*Relationship to Employee [REDACTED]

*Dependent Beneficiary Type [REDACTED]

*Gender Unknown

*Marital Status Single

As of [REDACTED]

As of [REDACTED]

As of [REDACTED]

As of [REDACTED]

Occupation [REDACTED]

Occupation [REDACTED]

Occupation [REDACTED]

USA

National ID

1-1 of 1 View All

*Country	*National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number	[REDACTED]	<input checked="" type="checkbox"/>

OK Cancel Apply

Name Address Personal Profile

28. Enter the **Date of Birth** for the dependent.

29. Click the **Relationship to Employee** dropdown and select **Child**.



Benefits Job Aid

BN361 Completing a Manual Event

30. Select **Approved Dependent** from the drop down next to **Dependent Beneficiary Type**.
31. Select the **Gender** from the drop-down menu.

Note: If any additional information was provided by the employee for the dependent, enter it on this page. The Student and Smoker checkboxes are not used on this page.

32. Enter the **National ID** for the dependent.

Note: If the employee has not provided a dependent's SSN, the Locality BA should leave the field blank. However, when the SSN becomes available, the employee or Locality BA should enter it as soon as possible. Dependent SSNs are necessary for accurate ACA reporting. As they do today, agencies should make at least three attempts at obtaining the dependents SSN. Agencies can use the **Base Benefits Consistency Audit** to monitor dependents missing an SSN.

33. Click **OK**.

The **BenAdmin Data Entry** page displays.

BenAdmin Data Entry

Event / Participant Selection | **Option Election** | Dependents / Beneficiaries

Schedule ID EM00 Employee ID LIZZIE DOE
Event ID 2 Event Data 11/01/2021 Birth or Adoption
Benefit Record 0 Excess Credit Rollover To Forfeit Excess Credits

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Doe,Billy	Spouse	Approved Dependent	02/05/1993
Doe,Lily	Child	Approved Dependent	10/04/2021

[Change/Add Dependent Data](#)

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
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OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

34. Confirm that both dependents display under the **Dependent/Beneficiaries Currently on Record** section.
35. Click on the **Option Election** tab.



Benefits Job Aid

BN361 Completing a Manual Event

The **Option Election** page displays.

BenAdmin Data Entry

Event / Participant Selection | **Option Election** | Dependents / Beneficiaries

Sched ID EM00 Empl ID LIZZIE DOE Ben Record 0 Event ID 2
Event Data 11/01/2021 Birth or Adoption Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ? 1 of 1

Plan Type 10 : Medical

Option Code 24 Key Adv 500 Preventive Dent (176F06) (Family)

Health Provider ID ☐ Previously Seen

Special Requirements

Dependents/Beneficiaries

Enroll All

Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Billy Doe	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>

+ -

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

36. Click on the magnifying glass under ***ID** field.

Note: To add dependents to **Plant Type 10: Medical** Family coverage you can either click on **Enroll All** or add them one by one individually. For this scenario, we will show how to add them one by one.



Benefits Job Aid

BN361 Completing a Manual Event

The **Look Up ID** page pop up displays.

The screenshot shows the 'Look Up ID' pop-up window. The background interface includes tabs for 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. The 'Option Election' tab is active, showing details for 'Plan Type 10 : Medical'. The 'Look Up ID' pop-up has a search form with fields for 'Empl ID', 'Dependent ID' (with a 'begins with' dropdown), and 'Name' (with a 'begins with' dropdown). Below the search form are buttons for 'Search', 'Clear', 'Cancel', and 'Basic Lookup'. The 'Search Results' section shows a table with the following data:

Dependent ID	Name	Relationship to Employee
01	Doe,Billy	Spouse
02	Doe,Lily	Child

37. Click on the dependent you want to enroll in the medical plan benefits. In this example it would be the **Child**.



Benefits Job Aid

BN361 Completing a Manual Event

The **Option Election** page returns.

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Billy Doe	Spouse		<input type="checkbox"/>	Spouse	<input type="checkbox"/>
02	Lily Doe	Child		<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>

38. Click **OK**.

The **On-Demand Event Maintenance** page returns.

On-Demand Event Maintenance

LIZZIE DOE Person ID [redacted] Ben Record 0

Activity Date [redacted] Source [redacted] Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 11/01/2021 **Status Entered** Class BIR **Event Status Open for Processing**

Prepare Options Enrollment Statement Run Date

Election Entry Entered 1 of 1 Show Plans

Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

39. Confirm the **Status** is **Entered**, and the **Event Status** is **Open for Processing**.



Benefits Job Aid

BN361 Completing a Manual Event

40. Click on **Validate/Finalize** button to execute the programming process to validate elections, close the event, and update the Base Benefits Tables.
41. Click **OK** on the pop-up window.

The **On-Demand Event Maintenance** page refreshes and returns.

The screenshot displays the 'On-Demand Event Maintenance' page for 'LIZZIE DOE'. The page is titled 'Benefits Administrator' and includes a sidebar with navigation options. The main content area shows the following details:

- Person ID:** [Redacted] **Ben Record:** 0
- Activity Date:** [Redacted] **Source:** [Redacted] **Empl Record:** 0
- Event ID:** 2 **Event Date:** 11/01/2021 **Status:** Finalized - Enrolled **Class:** BIR
- Event Status:** Closed to Processing
- Frequency:** Deduction Frequency (selected), Annual Frequency
- Entered:** 0 of 0 **Errors:** 0
- Process Indicator:** N **Normal Processing:** [X]

The page includes several buttons for actions: 'Schedule/Prepare Activity', 'Prepare Options', 'Enrollment Statement', 'Election Entry', 'Validate/Finalize', 'Confirmation Statement', 'Reprocess', 'Event Status Update', 'Show Plans', 'Show Errors', 'Finalize/Apply Defaults', 'Save', 'Return to Search', and 'Notify'.

42. Confirm the **Status** is **Finalized – Enrolled** and the **Event Status** is **Closed to Processing**.

Note: The Coverage Begin Date for **Birth** and **Adoption** is the date of the event as opposed to the top of month the way it is in BES.